

## Evaluating a Subordinate 10-7.02-P

EVALUATE a subordinate's leadership abilities in accordance with the performance dimensions listed here. Complete the Employee Review in Direct Access and submit the evaluation to your supervisor. For reference, use the CG-People Soft Quick Reference Guides and E-PME Study Guide.

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|---|---|
| <ul style="list-style-type: none"> <li>Communication</li> <li>Responsibility</li> <li>Directing Others</li> <li>Working with Others</li> <li>Developing Subordinates</li> <li>Looking out for others</li> <li>Setting an Example</li> </ul> | <ul style="list-style-type: none"> <li>Military Bearing</li> <li>Customs and Courtesies</li> <li>Integrity</li> <li>Loyalty</li> <li>Respecting Others</li> <li>Humans Relations</li> </ul> |
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### ***Evaluating a Subordinate using Direct Access***

For this performance requirement, you need to submit an evaluation of a subordinate's leadership abilities to your supervisor, using Direct Access.

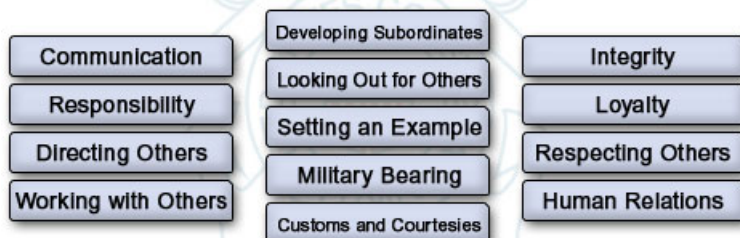
Direct Access can only be accessed via the Coast Guard Intranet. However, reference guides and tutorials are available for assistance. They can be accessed on the Internet at:

<http://www.uscg.mil/hq/psc/cghrms/index.htm>

### ***Performing the Employee Evaluation***

For this performance requirement, you need to evaluate a subordinate's leadership abilities using Direct Access and submit the evaluation to your supervisor.

## Evaluating a Subordinate



### ***Rating Common Characteristics***

Common characteristics on which employees are rated include the following:

- **Communication.** Provides adequate written and verbal communication on short- and long-term work assignments.
- **Responsibility.** Accepts responsibility for work assignments and personal actions.
- **Directing Others.** Is able to provide direction to others in order to most efficiently complete assignments.
- **Working with Others.** Is a “team player” who can be counted on.
- **Developing Subordinates.** Provides opportunities to improve skills and develop professionally.
- **Looking out for Others.** Protects coworkers and locates opportunities for them to grow.
- **Setting an Example.** Serves as a positive example in demeanor, work ethic, and personal traits.
- **Military Bearing.** Acts and reacts as a military member, cognizant of chain of command and military responsibilities.
- **Customs and Courtesies.** Follows and embodies Coast Guard customs and courtesies.
- **Integrity.** Words and actions can be trusted.
- **Loyalty.** Maintains strong bonds to the country, the Coast Guard, superiors, and subordinates.
- **Respecting Others.** Allows for individual differences among persons of varying backgrounds.
- **Human Relations.** The degree to which the member fulfilled the letter and spirit of the Coast Guard’s Human Relation/Sexual Harassment policy and personal relationships and actions.

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### ***Using Direct Access***

Here’s the general process for using Direct Access to complete an employee review. To complete an evaluation in Direct Access, you need the member’s Employee ID or Social Security number.

To begin, either enter the Employee ID/SSN or employee name on the “Find an Existing Value” screen. No other information is required.

*Using Direct  
Access (continued)*

PeopleSoft.

Home Worklist Help Sign Out

Home > Develop Workforce > Plan Careers > Use > Employee Review

New Window

Employee Review

Find an Existing Value

EmplID:

Empl Rcd Nbr:

Employee Classification:

Last Name:

First Name:

SetID: AUSCO

Company:

Department:

Once you've located the employee, the system defaults to the Employee Review tab. The four fields that must be completed are:

- Effective Date. Enter period date.
- From/To Date. Enter the beginning and end dates of the review period.
- Review Type. For routine reviews, select "Regular."
- Rating Scale. Select the member's rate (E-level).

Any field with a magnifying glass provides help with your selection.

PeopleSoft.

Home Worklist Help Sign Out

Home > Develop Workforce > Plan Careers > Use > Employee Review

New Window

Employee Review Reviewers Comments Exceptions

Employee ID: ##### Empl Rcd#: 0

Review Details

Effective Date: 11/30/2003

From/To Date: 07/01/2003 11/30/2003

Review Type: Regular

Next Review Date: 11/30/2004

Business Unit: AUSCO All U. S. Coast Guard Units

Department: 003464 COMMANDANT (O-WTL)

Job Code: 479091 Senior Chief Marine Science Te

Company: COA

Position: 00033140

Rating Scale: E8 Senior Chief PO Review

Rating Model: EVAL Enlisted Performance Eval

Scale Type:

After completing the Employee Review tab, select the Reviewers tab. Then, enter your competency ratings for the employee.

Since the review does not have to be completed before being saved, you can save it at any time.

*Using Direct  
Access (continued)*

Fields you can complete are:

- **Evaluation Type.** Select Supervisor from the drop-down menu.
- **Employee ID.** Enter your own ID number.
- **Competencies Rating.** Enter a rating number on a scale from 1-7 for each competency. Any field with a magnifying glass provides help with your selection. Selecting the “Note” button located in the far right column gives you access to a full description of the competency, including a competency breakdown of each rating.

Two competencies—Conduct and Recommendation for Advancement—have unique alphabetical entries, which provide a more in-depth look at these special ratings.

Ratings of 1, 2, and 7 require comments to be entered. Select the “Note” button to go to the Comment screen.

The screenshot shows the PeopleSoft Employee Review interface, specifically the Reviewers tab. The top navigation bar includes Home, Worklist, Help, and Sign Out. The main header shows the employee's name, ID, and EmpID. Below this, the Review Details section displays Effective Date, Next Review Date, Business Unit, Salary Administration Plan, and Job Code. The Reviewers section shows the Evaluation Type (Supervisor) and Reviewer ID. The Competencies table lists two competencies: ECL1C (Directing Others) and ECL2C (Working with Others), each with a Weight, Rating, and a Note button.

Competency	Description	Weight (%)	Rating	Short Desc
ECL1C	Directing Others	0	6	Excellent
ECL2C	Working with Others	0	7	Superior

After completing all fields on the Reviewers tab, select the Comments tab. The comments entered are for internal routing use only. It is information for your supervisor.

The screenshot shows the PeopleSoft Employee Review interface, specifically the Comments tab. The top navigation bar includes Home, Worklist, Help, and Sign Out. The main header shows the employee's name, ID, and EmpID. Below this, the Description section displays the competency description for ECL1C (Directing Others). The Comment section has a text area for entering comments.

**Description:** DIRECTING OTHERS  
The effectiveness of this member in influencing and guiding others in the completion of tasks.

**Comment:**

***Using Direct  
Access (continued)***

- After entering your comments:
  - ▶ Select the Exceptions tab.
  - ▶ Enter your supervisor's Employee ID.
  - ▶ Select the Validate Employee Review button to access a list of exceptions. This list may direct you to make changes or additions to the Employee Review.
- After making any required changes:
  - ▶ Select the Validate Employee Review button.
  - ▶ Repeat this process until all exceptions are addressed.
- After the exceptions are cleared:
  - ▶ Select Save, then Submit. The evaluation goes to your supervisor for his or her review.

The screenshot displays the PeopleSoft Employee Review interface. At the top, the PeopleSoft logo is visible. Below it, a navigation bar includes links for Home, Worklist, Help, and Sign Out. The main content area is titled 'Employee Review' and shows details for 'Doe, John S.' with Employee ID 1234567 and Empl Rcd#: 0. The 'Exceptions' tab is selected, showing a table with one exception. The table has columns for Seq. No., Competency Short Description, and Description. The first exception (Seq. No. 1) has a description that reads: 'Reminder - Before this review can be checked Final, the Evaluation Type must be set to A (Approved Official). Evaluation Type=R, REVIEWER\_ID=1062776'. Below the table, there are buttons for 'Validate Employee Review' and 'Submit'. A 'Final' checkbox is also present.

Seq. No.	Competency Short Description	Description
1		Reminder - Before this review can be checked Final, the Evaluation Type must be set to A (Approved Official). Evaluation Type=R, REVIEWER_ID=1062776

When you have completed your subordinate's employee review, contact your supervisor.

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